- **ASIG members,**
  The Case Study team (Gene Bacher, Lanelle Butts, Paul Baca, Brian Wong, and Michael McCain) have developed an assessment tool to provide consistent data for our case studies. It's our intent that the tool be completed - prior to writing case studies - by each ASIG member for the Performance and Cost Measurement initiatives in their organization. Once the tool is completed, ASIG members should be able to easily transfer the information they used so it becomes the "meat" of their case study write-up. The goal of the tool is to make sure our case studies talk about the same things at the right level of detail.
  In a second phase that is TBD at St. Louis, we will select a set of organizations from our Senior and Functional-level survey returns that we (ASIG team members) can interview using the assessment tool, the end goal being a case study covering these organizations as well.
  Please find attached the tool and an overview presentation that was also given Thursday at the conference call. We ask that each ASIG member complete - in 12 point Times New Roman - an Assessment Tool and return to me (Jason.heung@rgsinc.com) by COB Monday, June 7th. If you are also covering another organization, please try and complete a tool for them by this date as well. Please let me, or any other Case Study team member, know if you have any questions.
  Per request from the conference call, I've also attached a list of the organizations that responded to our surveys.
  Thanks,
  Jason Heung Senior Consultant RGS Associates, Inc. 703).769.5864

CAM-I ASIG Assessment Tool Purpose

- **Provide data for the case study**
- **Consistency: To make sure our case studies talk about the same things**
- **Objectively "rate" PCM initiatives**
  - Ratings allow statistical analysis, if desired
  - An analytical way to "downselect" initiatives for the blue book

CAM-I ASIG Assessment Tool Parts

- **Maturity Assessment (Part I)**
  - Determines the PCM initiative's stage of maturity under "milestone" and "dynamic" views of Cost Management System Development
- **Guiding Principles Assessment (Part II)**
  - A section of questions/statements for each principle whose ratings determine whether the initiative exhibits that principle
  - An introductory paragraph explains what we mean by the principle
  - Duplication between principles was removed (to reduce confusion)
- **Success Gauge (Part III)**
  - Determines the success by rating whether the initiative met its intended scope and objectives within budget and schedule
  - Identifies which principles contributed to this success

CAM-I ASIG Assessment Tool Outcome

- **Initial goal: See whether our initiatives demonstrated the principles**
- **Current goal:**
  - See whether our initiatives demonstrated the principles (Part II)
  - See whether the principles contributed to success (Part III)
  - Caveat the above by considering maturity (new initiatives are unlikely to demonstrate principles or have any success yet) – Part III
- **Outcomes:**
  - Assessment Tool data becomes foundation for case studies (see next slide)
  - We can choose the right case study for each principle chapter in the blue book (and not discredit any PCM initiative because it is immature)

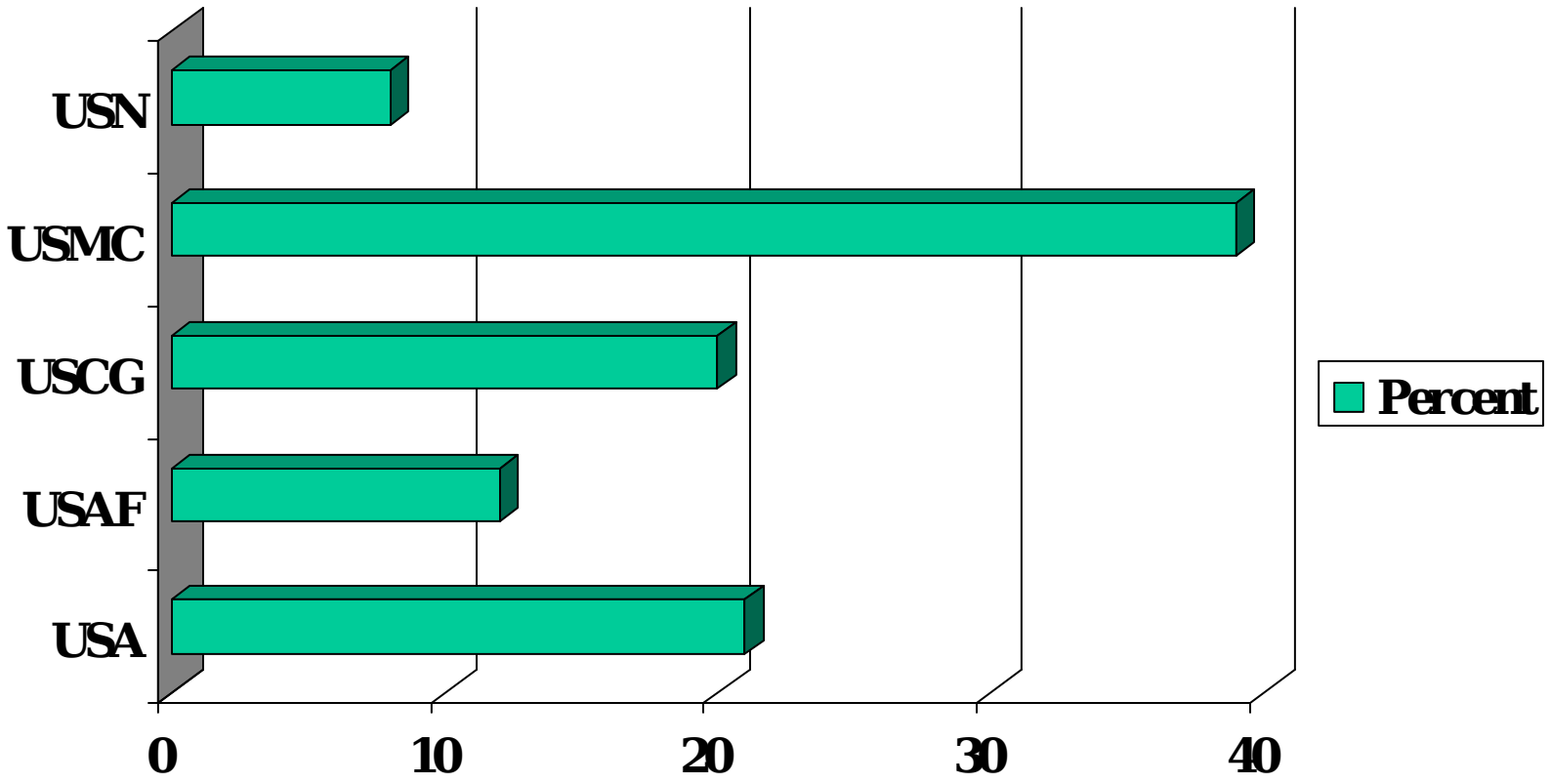
CAM-I ASIG Assessment Tool Link to Case Study Report Elements

- **Introduction**
  - Objectives of the implementation (Part III: PCM Success Gauge)
  - Principles demonstrated by the implementation (Part II: Guiding Principles)
  - How does it add to the services' mission
- **The Study**
  - General
    - demographic stuff (Part III: PCM Success Gauge)
    - objective of initiative (Part III: PCM Success Gauge)
  - Detail of case study
    - describe baseline (Part I: Organizational Maturity)
    - Results (Part III: PCM Success Gauge)
- **Findings**
  - Relate to guiding principles (Part II: Guiding Principles Assessment)
  - Value to organization
    - What was the success, what was the result (Part III: PCM Success Gauge)
    - What difference did the CPM initiative make? (Part II: Guiding Principles)
  - Lessons learned (this can be related to Part II: Guiding Principles)

CAM-I ASIG Assessment Tool Roll Out

- **Phase I**
  - Release to ASIG
  - ASIG members complete and use for the write-up of their case studies
  - Case study outlines due to ASIG end of May; Assessment Tools by CAM-I 2Q (June 11)? To whom?
- **Phase II**
  - Identify “outside of ASIG” case study candidates from SLS and FLS (surveys)
  - ASIG members interview these outside organizations using the assessment tool to get the data necessary to write the related case study
  - Schedule? TBD
- **Phase III**
  - Analysis to determine which cases are used in the blue book
  - Schedule TBD

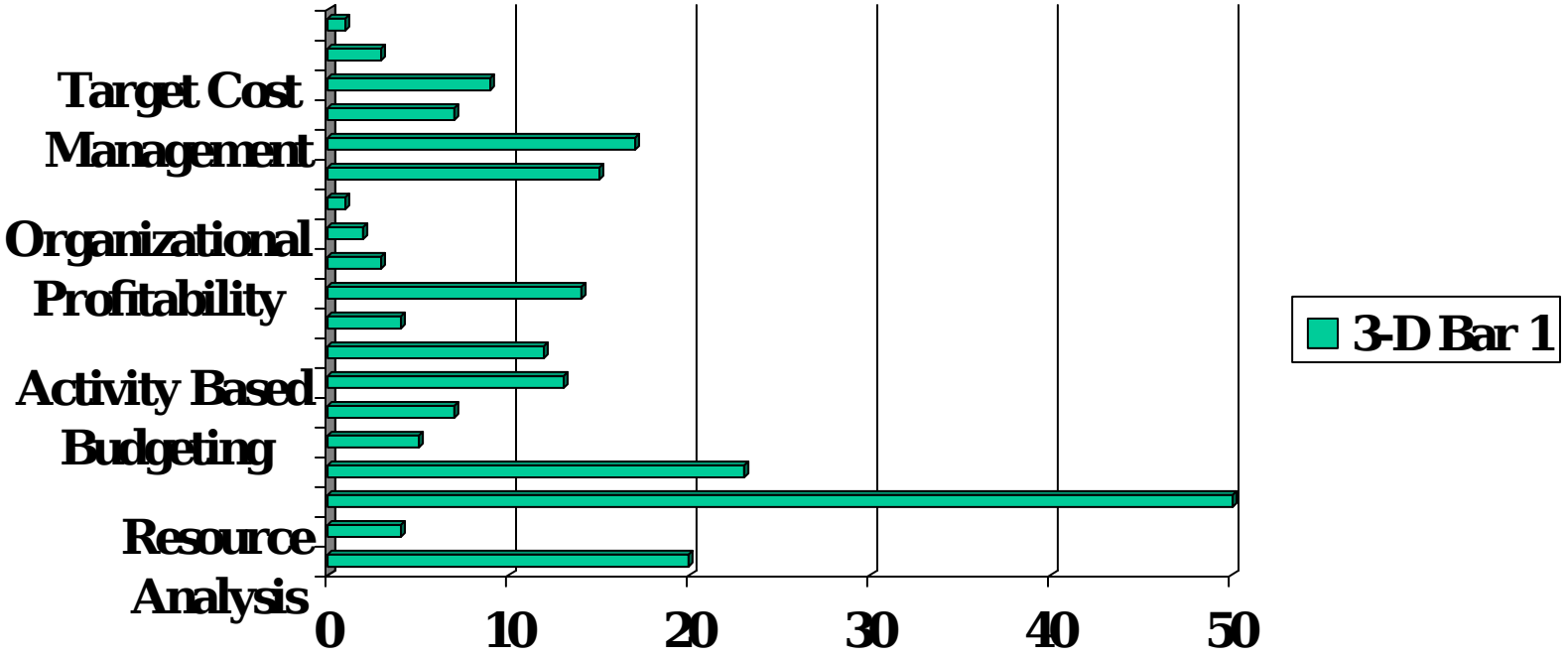
To what branch of service are you attached?



To what branch of service are you attached?

Choice	Count	Percentage Answered
USA	14	21.2%
USAF	8	12.1%
USCG	13	19.7%
USMC	26	39.4%
USN	5	7.6%

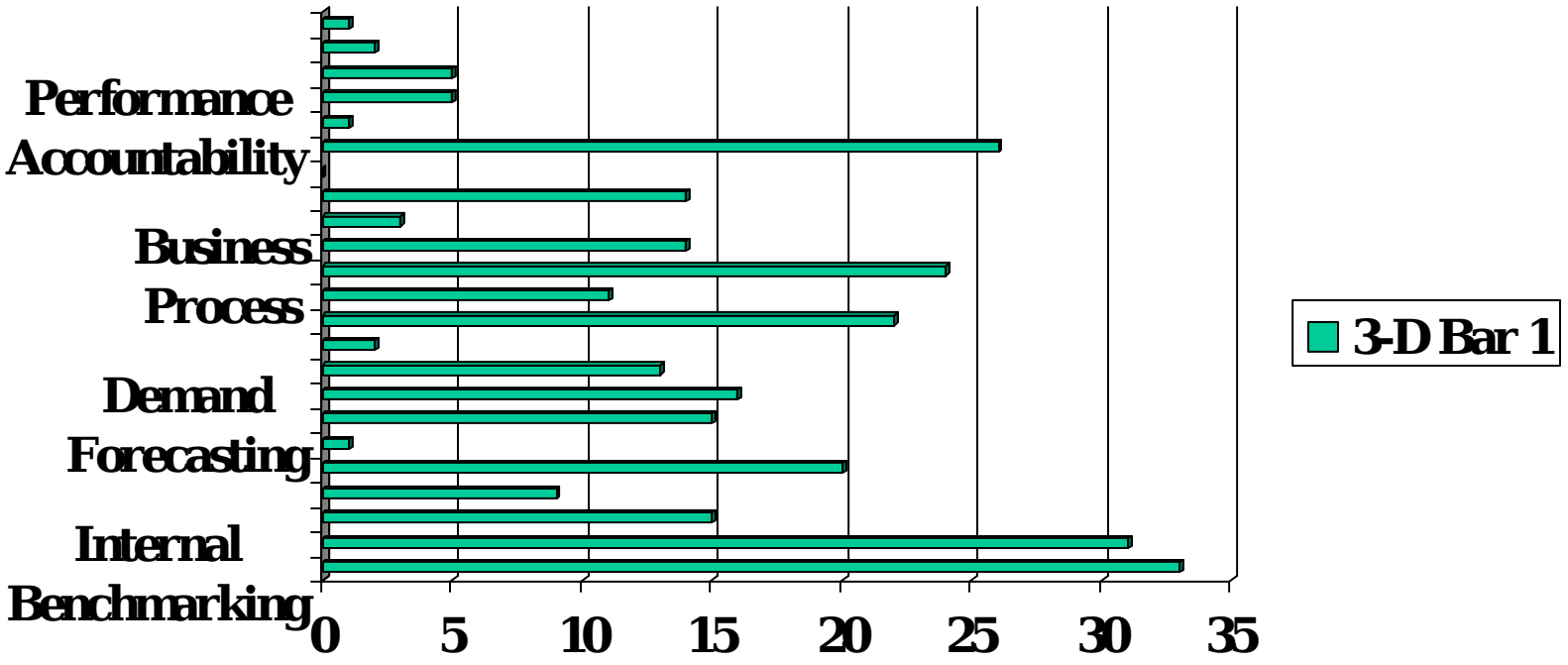
Which of the following Modeling and Analysis Techniques is your unit employing, or has your unit employed (mark all that apply) ?



Which of the following Modeling and Analysis Techniques is your unit employing, or has your unit employed (mark all that apply) ?

Choice	Count	Percent of Sample
Resource Analysis	20	30.3%
Full Cost Absorption	4	6.1%
Activity Based Costing	50	75.8%
Activity-Based Performance Measurement	23	34.8%
Activity Attribute Analysis	5	7.6%
Activity Based Budgeting	7	10.6%
Cost Driver/Root Cause Analysis	13	19.7%
Activity Driver Analysis	12	18.2%
Capacity Analysis	4	6.1%
Product/Service Costing	14	21.2%
Organizational Profitability Analysis	3	4.5%
Cost Object Profitability Analysis	2	3.0%
Product Mix Rationalization	1	1.5%
Unit Cost Measures	15	22.7%

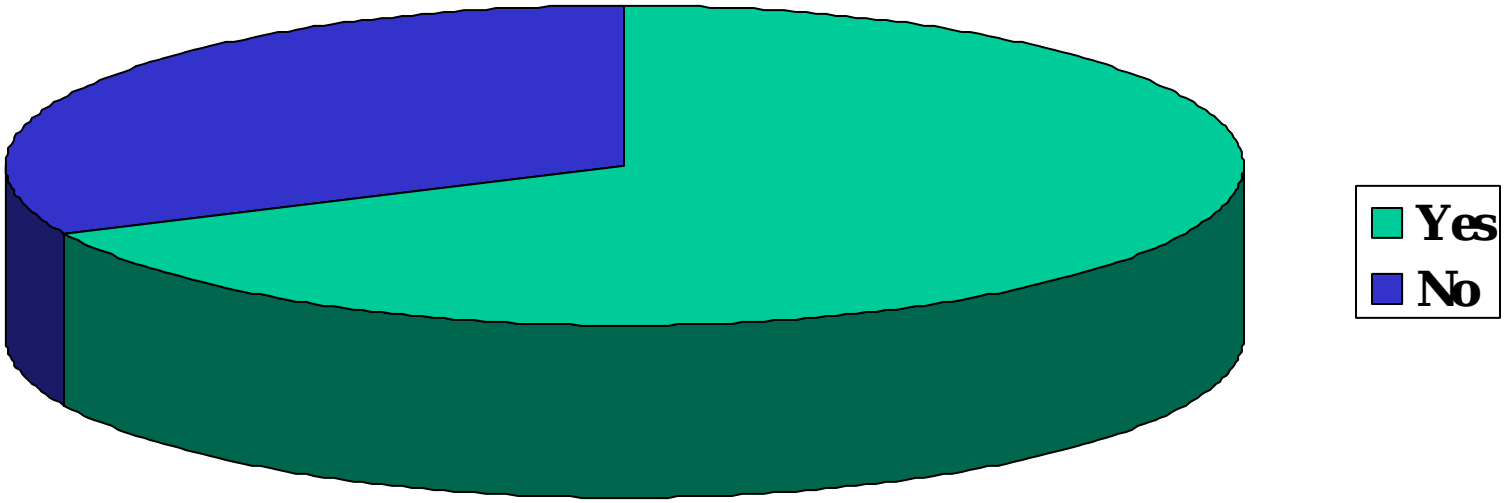
Which of the following Complementary Analysis & Improvement Techniques is your unit employing, or has your unit employed (mark all that apply) ?



Which of the following Complementary Analysis & Improvement Techniques is your unit employing, or has your unit employed (mark all that apply) ?

Choice	Count	Percent of Sample
Internal Benchmarking	33	50.0%
External Benchmarking	31	47.0%
Life Cycle Costing	15	22.7%
Move/Relocate Operations	9	13.6%
Productivity Improvement	20	30.3%
Replicate Operations	1	1.5%
Demand Forecasting	15	22.7%
Workload Forecasting	16	24.2%
Product/Service Pricing	13	19.7%
Benefits Realization	2	3.0%
Business Process Mapping	22	33.3%
Business Process Modeling	11	16.7%
Business Process Improvement	24	36.4%
Business Process Redesign	14	21.2%
Six Sigma	3	4.5%
ISO 9000	14	21.2%

Did your unit successfully implement a Cost and Performance Management initiative?



Did your unit successfully implement a Cost and Performance Management initiative?

Choice	Count	Percent of Sample
Yes	**36**	**54.5%**
No	**17**	**25.8%**

Mapping Chapters to Lit. Search

Enabling (how the work is done)

- Outcomes before outputs
  - **Article 1**
  - **Article 3**
- Readiness before cost
  - **Article 4**
- Targets before tasks
  - **Article 2**
- Strategy before work
  - **Article 3**
- Simplicity before scale
  - **Article 1**
  - **Article 4**

Mapping Chapters to Lit. Search

Imperatives (will be there in every case)

- Passion before productivity (leadership)
  - **Article 4**
- Meaning (mission) before mandates
  - **Article 2**
  - **Article 3**
- Burning platforms before politics
  - **Article 1**
  - **Article 3**
  - **Article 4**